

**US Department of Education
Student Financial Assistance (SFA)
Modernization Partner Program
Management Services Achievement Report
(May 2001)**

Overview

The Program Management Services Achievement Report documents the Modernization Partner's ability to effectively provide Leadership and Direction Setting and to execute the processes and services as prescribed in the Modernization Program Plan.

The Leadership and Direction Setting function includes the following:

- Ensure across the enterprise the integration of the business functions, the application architecture required to support the business functions, the organization, and the Program direction
- Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan, revising as appropriate
- Revise Modernization Blueprint in accordance to the Target State Vision and Integrated Sequencing Plan
- Continue to develop relationships with strategic partners and product vendors to support Program initiatives and provide best in business solutions

In addition, the Modernization Partner leadership team is committed to helping SFA deliver to its milestones documented in the Modernization Blueprint Sequencing Plan, as documented below.

Outcomes Achieved:

The Modernization Partner leadership team has performed these functions as demonstrated below:

- ✓ Integration across the enterprise
 - Shifted leadership resources to focus on integration efforts across the program and between Modernization Partner and SFA CIO.
 - Continued work on an approach and conceptual design for SFA's strategy to create an integrated school identification strategy for use by modernized SFA systems.
 - Modernization Partner ITRs continued to work with the GMs to coordinate efforts across the Modernization Partner teams focused on each of the SFA PBO Victory List items.
- ✓ Provide leadership, direction setting and correction to the Target State Vision and the Integrated Sequencing Plan
 - Issued new release of the Target State Vision diagrams dated May 3, 2001 reflecting Management Council input and evolving modernization plans.

- Drafted an updated FY01 Integrated Sequencing Plan that ties current modernization initiatives to the goals of the Target State Vision, SFA Performance Plan, and the 19% Cost Savings Plan.
- ✓ Revise Modernization Blueprint
 - Incorporated comments from the Secretary of Education's office into the Modernization Blueprint and delivered an updated version to the SFA Chief Operating Officer.
- ✓ Continue to develop relationships with strategic partners and product vendors to support Modernization initiatives and provide best in business solutions
 - Continued to partner with Public Strategies Group (PSG) to rollout team-based scorecards through SFA, inclusive of Operating Partners.
 - Continued to develop our strategic relationships with committed SFA Operating Partners to involve them in the Modernization Initiatives:
 - Continued to work with KPMG in conjunction with SFA Operating Partners to support the eSign initiative.
 - Continued to develop relationships with CSC and EDS in the operation of production applications (IFAP/Schools Portal, FMS Phase II, ITA Release 1, and Ombudsman).
 - Continued to work with NCS Pearson in TIVWAN planning activities.
 - Continued to work with KPMG and AFSA on the COD share-in-savings planning activities.
 - Continued to work with ACS and KPMG in developing share-in-savings deal for FARS retirement.
 - Continued to work with NCS, Macro, and Meritage for FAFSA on the Web (FOTW) version 6.0.
 - Continued working with CSC to establish a direct working relationship for establishing and managing development environments for Modernization projects.
 - Coordinated monthly operating partner meetings with CSC, NCS, EDS, ACS, where the program status, opportunities, project directions are reviewed.
 - Continued our commitment to bring the best in business solutions and product vendors to the Modernization effort:
 - Reached an agreement with NCS and Macro to be part of the Modernization Partner team responsible for the delivery of FAFSA 6.0.
 - Continue to communicate Modernization Program initiatives with individual vendors – Viador, Autonomy and Interwoven - which will utilize their technologies.
- ✓ Overall Leadership and Direction Setting activities included:
 - Briefed SFA COO on FAFSA 5.x progress and took responsibility for the successful delivery of FAFSA 6.0. Will continue to provide weekly updates to the COTR on progress made.
 - Developed draft of the Direct Loan Modernization Approach, which charts the Direct Loan transformation, a five-stage journey towards a modernized servicing environment, and briefed Jennifer Douglas and Sybil Phillips.
 - Continued to work with KPMG to augment/enhance COD project team in key leadership positions, providing additional industry expertise and delivery experience.
 - Conducted COD Software Developers meeting, which provided COD XML migration and planning assistance to schools and third-party developers.
 - Given the security breach attempts made by the GAO, initiated efforts to strengthen security and privacy procedures and practices.

- As part of eCampus-based, recommended to use W3C (web standards body) to ensure that the standards for making web sites more accessible to persons with disabilities are adopted. Will share these standards with other web teams.
 - Presented Target State Vision to the GAO Review of Federal Electronic Initiatives and the GAO Audit of PBO Implementation.
 - Continued to work with SFA CFO, Department of Education General Counsel, and Contracts and Acquisitions to develop the umbrella framework for obligations of funds and shared-in-savings arrangements.
 - Continued to finalize the CDS Savings Calculation process to be a repeatable process to establish and confirm baselines. This process will be used by SFA, legacy contractors, and Modernization Partner to quantify savings resulting from the share-in-savings projects.
 - Continued to chair the DSG and integrated the efforts of the Target State Vision, the Integrated Sequencing Plan, the Modernization Blueprint and program funding around agreed upon priorities.
 - Continued to assist the DSG and IRB by facilitating the refinement of Modernization business cases and their presentation to the IRB for funding allocation.
 - Continued to support the SFA CFO develop an operational savings plan to achieve the COO's goal of a 19% reduction in unit costs by FY2004.
 - Continued to support SFA Transition Team planning.
 - Refreshed the content in the Modernization Center (Aerospace Building) to accurately reflect Modernization initiatives and progress.
- ✓ Other Awards:
- Supported SFA in preparing to present FORMS2000 as an e-Gov 2001 Pioneer Award winner.
 - Delivered joint oral presentation on CDS Retirement Share in Savings to the selection panel for the Business Solutions in the Public Interest Federal Acquisition Award. SFA is a finalist for this award. These oral presentations will be used to select the award winners.
 - Prepared nomination for SFA for the Accenture/MIT Digital Government Awards.

Key Milestones Delivered

Based on the Modernization Blueprint Sequencing Plan as of 8/31/00 (see Attachment A), the Modernization Partner has been effective in helping SFA achieve the milestones due for completion during the month of May 2001 as listed below. [The milestones noted with an asterisk (*) were rescheduled for completion during the month of May 2001.]

Nbr	X-Ref	Project	Milestone
n/a			No milestones were scheduled for completion or were completed during this month

The milestones that were scheduled for completion during the months of September 2000 through May 2001, but were not completed are listed below with the revised completion date identified.

Nbr	X-Ref	Project	Milestone	Revised Date
M38		SFA University	SFA Front-to-Back Training deployed to all SFA employees (original due date 11/30/00)	July 31, 2001
M39	V.B	HR Modernization	Redefined and Renamed: HR Automation Framework and Phase I Deliverables defined (original due date 3/30/01)	Task order submitted to SFA May 24, 2001; subject to award, will submit June 15, 2001

ATTACHMENT A:
Modernization Blueprint Sequencing Plan
(as of 8/31/00)